

Name(s):	Phone Number(s):
Occupation(s):	Email Address:
Home/Mailing Address:	

DAVID C. BRYANT, CPA - INDIVIDUAL INTERVIEW - 2023 INCOME TAX RETURN

Yes	No	Question / Response						
		Did you receive an identity protection PIN (IP PIN) from the IRS for the 2023 tax year? <i>If YES, please provide the letter that contains the PIN. *Your 2022 PIN will NOT work.</i>						
		Have you received a new state ID/driver's license since filing last year's tax return? <i>If YES, please provide.</i>						
		Has your filing status changed? <i>If YES, please select a box below:</i> <input type="checkbox"/> Married (Date: _____) <input type="checkbox"/> Divorced (Date: _____) <input type="checkbox"/> Taxpayer Death (Date: _____) <input type="checkbox"/> Spouse Death (Date: _____)						
		Did you move in 2023? <i>If YES, please provide the date your address changed:</i> _____						
		Did you purchase/sell/refinance a house in 2023? <i>If YES, please provide your closing disclosure(s). *We will need the disclosure for the SALE of your previous home AND the disclosure for the PURCHASE of your new home.</i>						
		If you have a home equity loan or line of credit, was it used to buy or improve a 1 st or 2 nd residence? <i>If NO, what was it used for?</i> <input type="checkbox"/> consolidate debt <input type="checkbox"/> buy car/boat <input type="checkbox"/> other: _____						
		Did you purchase insurance through the Health Insurance Marketplace at any time in 2023? <i>If YES, please provide 1095-A.</i>						
		Did you make any estimated tax payments? <i>If YES, please see 2nd page.</i>						
		Did you pay or receive alimony? <i>If YES, date of divorce:</i> _____						
		Have you had any debts cancelled or reduced? <i>If YES, we will need a 1099-C.</i> ➤ Was it part of bankruptcy? <i>If YES, we will need the bankruptcy documents.</i>						
		Did you contribute to an IRA, other than through your employer? <i>If YES, complete below:</i> <table border="0"> <tr> <td><u>Taxpayer</u></td> <td><u>Spouse</u></td> </tr> <tr> <td><input type="checkbox"/> Traditional (Amount: _____)</td> <td><input type="checkbox"/> Traditional (Amount: _____)</td> </tr> <tr> <td><input type="checkbox"/> Roth (Amount: _____)</td> <td><input type="checkbox"/> Roth (Amount: _____)</td> </tr> </table>	<u>Taxpayer</u>	<u>Spouse</u>	<input type="checkbox"/> Traditional (Amount: _____)	<input type="checkbox"/> Traditional (Amount: _____)	<input type="checkbox"/> Roth (Amount: _____)	<input type="checkbox"/> Roth (Amount: _____)
<u>Taxpayer</u>	<u>Spouse</u>							
<input type="checkbox"/> Traditional (Amount: _____)	<input type="checkbox"/> Traditional (Amount: _____)							
<input type="checkbox"/> Roth (Amount: _____)	<input type="checkbox"/> Roth (Amount: _____)							
		Did you take a distribution from an IRA, 401K, or 403B? <i>If YES, mark which and how many accounts:</i> <input type="checkbox"/> IRA _____ <input type="checkbox"/> 401K _____ <input type="checkbox"/> 403B _____ ➤ Was any part of this distribution paid <i>directly</i> to a charity?						
		Did you buy or sell stock?						
		Did you buy or sell company stock in 2023 from an employer that you work or worked for?						
		Did you contribute to a Health Savings Account (<i>not flex spending</i>)?						
		Did you receive distributions from a Health Savings Account (<i>not flex spending</i>)? <i>If YES, was all money used for medical expenses?</i>						
		Do you pay for long term health care (not health insurance; only long-term care)? <i>If YES, please provide amounts.</i>						
		Are you an active member of the Armed Forces or Reservist?						
		Did you receive a military pension?						
		Do you have a financial interest in or signature authority over any foreign financial accounts?						
		Did you BUY, SELL, RECEIVE, or SEND cryptocurrency in 2023? <i>Please circle all that apply. If anything is circled, please provide us with more information regarding the transactions.</i>						
		Did you start a new business during 2023?						
		Did you purchase rental property during 2023? <i>If YES, see question below.</i>						
		Do you own rental property? <i>If YES, please visit the 2023 Tax Year section of our website for the required questionnaire.</i>						

Did you sell an existing business, rental, or other property during 2023?

Did you purchase a new or used plug-in electric vehicle in 2023? *If YES, please provide the buyer's agreement.*

Did you make an energy efficient improvement to your home in 2023? *If YES, please provide documentation. *Please visit the [2023 Tax Year](#) section of our website for general examples.*

Did you gift anyone \$17,000 or more in dollars or property? *If YES, a gift tax return is needed.*

Was there a change in your dependents? *If YES, please select a box below:*

Add Dependent Name: _____ Date of Birth: _____ SSN: _____

Remove Dependent Name: _____ Reason for Removal: _____

Do you have a child, age 17-23, whom is a student and had lived with you for *over* half the year (whether away at college or not) **OR** a non-child relative that you supported?

Did you pay childcare costs for a dependent child under age 13 so you could work? *If YES, please see below.*

Did you or your child go to college full time (6 credits) for at least one semester? *If YES, please provide tuition (1098-T), room, board, supplies, etc. and mark which year of college below:*

Freshman **Sophomore** **Junior** **Senior**

Did you make any contributions to an education savings or 529 plan account?

Were distributions from a 529 plan used to pay for your child's tuition, room, board, etc.? *If YES, please provide 1099-Q.*

➤ **IF YES TO EITHER QUESTION BELOW:** please provide a voided check or write your bank name, routing, and full account number here: _____

➤ **If the requested bank information above is NOT provided and you receive a refund, it will be sent to you as a check via mail.**

If you receive a refund, would you like it to be direct deposited?

If you owe money, would you like it to be directly withdrawn?

Estimated Tax Payment Information

Date of Payment	Amount	Paid to (Fed/State/Local)	Date of Payment	Amount	Paid to (Fed/State/Local)

Childcare Information

Child's Name	Provider Name	Address	EIN	Cost

NEW CLIENT SECTION

Please provide a copy of your previous year's tax return and complete the information below.

	Name	Date of Birth	Social Security Number
Taxpayer			
Spouse			
Dependent			
Dependent			

Referred by: _____

By signing below, you verify that all data given to David C. Bryant, CPA, may be used in preparation of your 2023 individual income tax returns.

Signature of Interviewee

Date of Interview